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**From:** Fields, Jenifer [fields.jenifer@epa.gov]  
**Sent:** 1/19/2021 3:54:42 PM  
**To:** McManus, Catharine [mcmanus.catharine@epa.gov]  
**Subject:** FW: Supplemental Guidance on Offboarding  
**Attachments:** HQ-Politicals\_Checkout\_Process\_01-13-2021.pdf; 3110-2\_Annotated 1-13-2021.pdf; Initial Supervisory Email.pdf

This was the latest advice.

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**From:** Carpenter, Wesley <Carpenter.Wesley@epa.gov>  
**Sent:** Wednesday, January 13, 2021 3:10 PM  
**Subject:** Supplemental Guidance on Offboarding

Noncareer Executives & Staff:

Good afternoon. As a follow-up to Micah Meadowcroft's email last night, I want to share supplemental information with you on the agency's offboarding requirements. First and foremost, please understand that this email focuses on AO noncareer executives and staff. The noncareer executives and staff in the NPMs and Regions should be coordinating internally within their own organizations on these requirements. The Office of Mission Support developed a more streamlined and centralized approach for offboarding to ease the amount of time that you need to spend on completing these requirements. The three attachments are provided to assist you, which include OMS's Supplemental Guidance, an Annotated Employee Separation Checklist highlighting in yellow only those offboarding requirements that you need to complete independently (those requirements not highlighted have already been completed by OMS (thanks to Donna and her team) for you), and the email message from Mandy on January 7 regarding resignations which you will use as your initial supervisory email. In reviewing the Supplemental Guidance and Annotated Employee Separation Checklist, please note which parts of the employee separation requirements you need to complete. Most items are self-explanatory, but there are some requirements that need additional clarification or guidance, which is provided in the following bullets:

- The AO Program Management Officer (PMO) is Terrence Jackson, the AO Personal Property Custodial Officer is Donna Jenkins and the Records Liaison Officer (RLO) is Lena Ferris. Please reach out to Terrence, Donna or Lena if you need any assistance or help from them.
- Form 3110-49 (Records Management): Please coordinate completing the records management requirements with Lena Ferris. You should have received a separate email from Lena to schedule a meeting with her closing out your records management requirements, including Litigation Holds. When the requirements are completed, Lena will sign the form and forward it to the First Line Supervisor for signing (see details on First Line Supervisors in the last bullet). The First Line Supervisor will then sign the form and return it back to you for uploading into your One Drive Share Folder or the First Line Supervisor will upload your form into your One Drive Share Folder on your behalf.
- Political Appointee Equipment Return Checklist – Your laptop, mobile devices (i.e., phones and tablets), PIV card, and office keys will be able to be left at your workstation or can be mailed back to the agency. There is a Political Appointee Equipment Return Checklist in the attached Supplemental Guidance that you need to complete. OMS will be providing all HQs noncareer executives and staff a preaddressed box with the agency's address for you to place these materials and completed checklist into. You can leave the box in your office when you depart the agency or you can take the box home and mail the materials back to the

agency. Due to the security concerns next week with the Inauguration, I recommend you take all your materials, the completed checklist and the box with you home over the weekend, so you can mail these materials back to the agency if an incident occurs and you are not able to get back into the office next week. OMS will be delivering these boxes to your office today or tomorrow. Micah Meadowcroft will also have additional boxes if you did not receive one, so please coordinate with him if needed.

- Resignation Letter – please refer to Mandy’s January 7 email (see attachment).
- OGC Ethics Offboarding Requirements – please contact Justina Fugh or the Ethics Office to complete the offboarding session; complete your Final Financial Disclosure (OGE-278) using the Integrity link, and complete the Notice of Negotiation Form (see attached Supplemental Guidance) and submit it to the Ethics Office using the email address provided. At that time, you should request OGC Ethics send you an email indicating that you have completed all ethics requirements, which you should include in your One Drive Share Folder.
- Mobile Device Acknowledgement Form – Nicole Smoot or Donna Jenkins have sent you an email with this form attached to complete and return back to them. If you have more than one device, you received a form for each device which needs to be completed, signed and returned. You do not need to worry about the original form you signed when you received the device(s). If you have any questions, please reach out to one or both of them.
- National Security Information Program Debriefing (only applies to those employees with a security clearance). The NSI Program Team is coordinating these debriefing sessions, so you should have received information from them. You should receive an email from the NSI Program Team when you have completed the requirement. Please upload this email into your One Drive Share Folder.
- Passports – Please reach out to the OITA POCs identified in the Supplemental Guidance, so you can return government issued passports and/or receive an email back from OITA indicating that you have completed this offboarding requirement. Please upload this email into your One Drive Share Folder.
- Travel Claims and Citi Bank Credit Card Balances – Please ensure you submit any outstanding vouchers or pay off credit card balances prior to departing the agency. If you have any questions, please contact me directly.
- Transit Subsidy Program Withdrawal Form (See attached Supplemental Guidance) – Please complete the form and submit it to the Transit Subsidy Office. You should receive an email message back from them, which you should upload into your One Drive Share Folder.
- Parking Permit & Parking Access Card – Please contact the OMS POC to complete this requirement if applicable, which is referenced in the attached Supplemental Guidance.
- Update Your Address in Employee Express – Please access EEX using the link or phone number provided in the Supplemental Guidance to update your address if needed.
- Time Cards for Pay Period January 18-29, 2021 – When completing your time card for the subject pay period, January 18 is a holiday, January 19 is a regular work day, January 20 is a hybrid of a half day as Admin Leave for the Inauguration for those at HQs (or a half day of work for non-HQs employees) and a half day of Leave Without Pay (LWOP), and January 21-22 and 25-29 is LWOP. Please complete your time card in accordance with these instructions, attest and submit your time card before departing the agency.
- Employee Separation Checklist (3110-2 Form) – When all the requirements are completed, please complete and sign your employee separation checklist and forward to your first line supervisor, which is the head career executive/manager in your organization, including Nancy Grantham (OPA), Robin Richardson (OCIR), Helena Wooden Aguilar (OP), Brian Hope (OEX), Lee Tanner (OPEEE), and me for everyone else.

OMS is also planning on facilitating some in-person offboarding sessions this Friday and next Tuesday if you have any questions or want to complete some of these requirements in-person. Please see the attached Supplemental Guidance for details.

For employees who have already started the offboarding activities, you can update your employee separation checklist by annotating those requirements that have been completed by OMS centrally if you have not done them already (see attached annotated employee separation checklist). If you have done them, you do not need to take any further action. OMS will be sharing the information they obtained from the requirements owners on those centrally completed

requirements with the AO PMO (Terrence Jackson). Terrence will coordinate with the First Line Supervisors to ensure this documentation is uploaded into each of your One Drive Share Folders.

I am sorry for the lengthy email, but wanted to provide clarity on the various offboarding requirements to ease the burden on each of you. Please do not hesitate to contact me if you have any questions. Thanks, and have a nice day.

Wes

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